

Case Study

Custom Software

International Business Consultant – Learning Assessment

Client

The client is a 40,000 strong international consulting company with offices in North America, Europe and locations all over the world. The company consults Fortune 500 businesses which are some of the largest companies in the United States and internationally.

Challenge

To develop a web-based training interactive that would effectively present a large amount of data in a targeted manner based on evaluative questions asked to the user. The user had to be able have quick reference to the meaning of technical terms that identified the applicable program so that the user would take the correct decision path to relevant information. The user interface needed to allow for easy access to reference material in order to proceed to proper areas that would assist in building the correct assessment approach and topic. The system also needed to generate PDFs of the completed assessment guide for the user has created.

Services Rendered

Insights: Analysis & validation | Execution options

Visual Design Services

UI design | Wire-framing | Information architecture

Development

Database design/architecture, Server & client-tier programming

Solution

A web-based assessment module

The solution was designed and created to support the deployment of a dynamic “smart” solution to evaluate and direct information to profiled audiences. The module would assess the user by ‘recording’ responses and guiding the user through the information in the assessment most applicable to them. When the user completed the assessment a custom

Decreased
processing times
by 24%

CATALYSTS

HYPOTHESES MODELING

We worked closely with internal stakeholders to visualize and present business model designs for early testing of workflows, navigation, usage tracking and overall data structure.

SOLUTION ENGINEERING

Based on established pass/fail criteria the team created an economical Minimum Viable Product to test the new process on the user base in order to determine how and at which points in the process the most value would be realized.

CUSTOM DEVELOPMENT

Using agile methods the team iterated, formalized and integrated the solution into the firms IT infrastructure for production use.

PDF was generated with all the reference and support materials needed to accomplish their tasks.

Features

- Multiple Question Types: Support for various types of questions inclusive of validation and saving of in-session data input.
- Custom recommendations guide users based on responses (logic algorithm)
- User specific assessment response based output (PDF) of reference and support materials

UI/UX screenshots– see below

Based on its type of intervention and stage of the solution, there is a unique **initiative objective** for your program.

According to your answers to the previous questions, your program's objective is identified below. You can review the full universe of 24 objectives to see if any appear to be a better match for your program. If they do, you will want to use the "Back" button to the right and check the relevant type of intervention and stage of the solution. Be sure to consult the examples for more clarity.

For more detail on these 24 objectives, see our [overview of the 3 step process](#).

Stage of the solution	Type of intervention					
	Knowledge development	Service/product development and delivery	Capacity enhancement and skills development	Behavior change programs	Enabling systems and infrastructure development	Policy development and implementation
Frame the problem	Problem's context, root causes, effects and scale are fully understood	Target constituents' need and demand for service/product fully understood	Target constituents' capabilities/skills gap and demand for program fully understood	Problem's context, causes, effects and target constituents fully understood	System gaps in coordination, trust and access fully understood	Context of issue and potential role for policy fully understood
Develop approach	Evidence-based hypotheses developed and research method designed	Proof of concept for service/product demonstrated	Program options designed and most promising model selected	Program options designed and most promising model selected	Gap-closing options designed and most promising solution selected	Policy options designed and most promising solution selected
Demonstrate and refine the solution	Hypothesis proven	Target constituents' needs for service/product met in pilots	New knowledge/skills applied by target constituents in pilots	New behavior exhibited by target constituents in pilots	Effective solution applied by early adopters	New policy position adopted by vanguard leaders
Scale and sustain	New knowledge adopted and broadly applied to address problem	Need and demand for all target constituents fully met by service/product	Capacity/skills gap for all target constituents fully met by program	Problem solved through mainstream role modeling of new behavior by target	System gaps eliminated through mainstream use of effective solution	Issues improved due to full implementation and broad enforcement of new policy

Step 1:
Clarify initiative objectives

Your assessment:
Type of intervention
Capacity enhancement and skills development

Stage of the solution
Scale and sustain

Initiative objective
Capacity/skills gap for all target constituents fully met by program

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Based on your program objective and related learning questions, we have developed a **short list of recommended assessment options**; the recommendations are marked with a check.

You will customize this short list to reflect the specifics of your program and organization in steps two and three, and narrow down the number of assessment options to make a manageable plan.

Assessment design	Data collection methods	Data analysis and interpretation methods
Experimental Design Rationale X Randomization not feasible if aiming for broadest use	Interviews Rationale ✓ Gain qualitative view of how well it works / meets need individual	Descriptive statistics Rationale ✓ Summarize quantitative data
Quasi experimental design Rationale ✓ Demonstrate effectiveness of widespread use by use of	Focus groups Rationale ✓ Gain qualitative view of how well it works / meets need multiple	Regression analysis Rationale ✓ Correlate outcomes to interventions to assess
Observational Design Rationale ✓ Is often considered less rigorous than experimental or quasi-	Participant Surveys Rationale ✓ Understand views across multiple participants	Cost analysis Rationale ✓ Assess cost implications at this scale
Simulations Rationale X Testing actual initiative at this stage, not a conceptual model	Direct observation Rationale X Challenge to collect comprehensively at broad scale	Multidimensional indices Rationale ✓ Aggregate single score to track trends across groups and time
	Implementation data collection Rationale ✓ Track outputs and intermediate outcomes specific implementing	Benchmarking Rationale ✓ Compare effectiveness across sites and alternative solutions
	Administrative data collection Rationale ✓ Collect applicable metrics routinely captured by	Mapping methods Rationale ✓ Assess level of usage across groups and unintended effects
	External data collection Rationale ✓ Identify external factors that could influence results	Expert review Rationale ✓ Draw conclusions from findings and past experience
		Strategic assessment Rationale ✓ Draw conclusions from findings

Could use
 Do not use
 Benefits
 Drawbacks
 Examples

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Next, let's consider the **relevance** of the **assessment** results. How important is the program being assessed for your organization? To the social sector at large? How applicable will the assessment results be to your institution and its **stakeholders**?

Key questions to consider when thinking about the relevance of your assessment:

- Is the scope of the assessment proportional to the importance of the program to the organization?
- Will this program generate lessons that are broadly useful throughout the organization?
- What information is missing from the sector's understanding of the topic which, if known, could enable better decision-making?
- Are there pending decisions in the sector (e.g., regulatory, budgetary) that could be influenced by this assessment?
- Will the assessment truly capture what is most important to the mission or purpose of the program (as opposed to what can be measured easily)?

Example implications for assessment:

- Assessment resources should be budgeted to reflect both the significance of the learning and the specific "size of the bet" made on the intervention
- If assessment results are applicable to a diverse set of programs within an organization, metrics should be simple (e.g., descriptive statistics)
- If assessment results will be shared broadly across the sector, metrics used should be commonly accepted to facilitate uptake and benchmarking

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Step 3:
Consider foundation priorities to select design options

Continue on page 9 of your workbook.

Enter the relevant information.

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